



Commonwealth Project Management (CPM) A Briefing for the JCOTS Integrated Government Advisory Committee

June 30, 2004



Presentation Outline

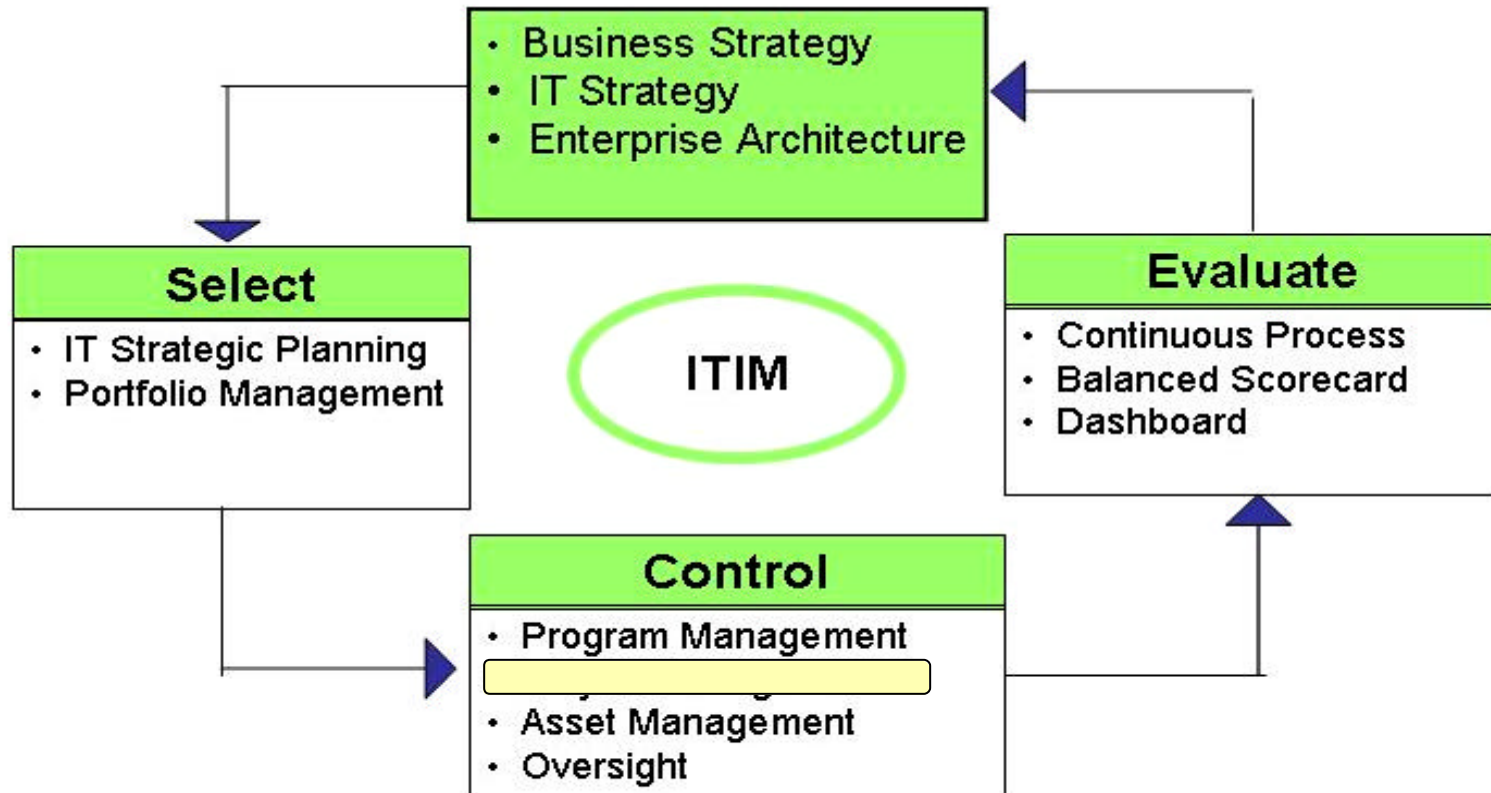
- **CPM Overview**
- **CPM Accomplishments**
 - Governance/Oversight**
 - Policies, standards and guidelines**
 - Processes**
 - PMDP Program**
 - Reporting**
- **Current Status**
- **Planned Milestones**
- **Questions and Answers**



CPM Overview



Commonwealth Technology Management Policy



Based on IT Investment Management (ITIM) Principles and Best Practices



Commonwealth Project Management (CPM)

Commonwealth Project Management is the application of knowledge, skills, tools, and techniques, to meet or exceed stakeholder needs and expectations from a Commonwealth Project.

The objective of CPM is to define a structured, disciplined approach for project management in order to deliver anticipated benefits from business-driven IT investments.

Focus on:

- Scope
- Costs
- Schedule
- Performance
- Risk



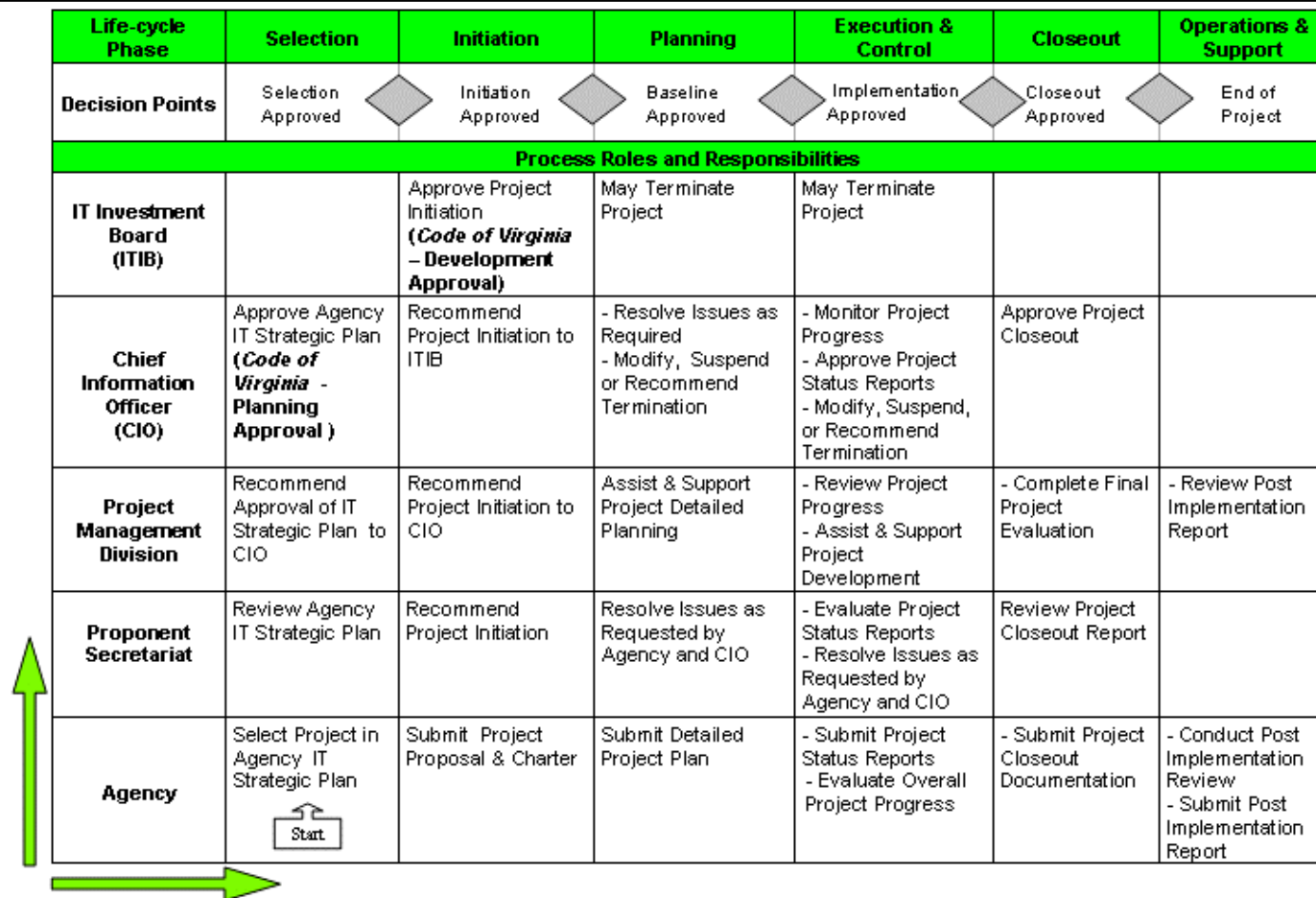
CPM Implementation Approach

CPM Implemented via

- Governance/Oversight
 - Policies, standards and guidelines
 - Processes
 - PMDP Program
 - Reporting
- ... throughout the life cycle of a project



CPM Project Life Cycle (Major IT Project)





CPM Attributes

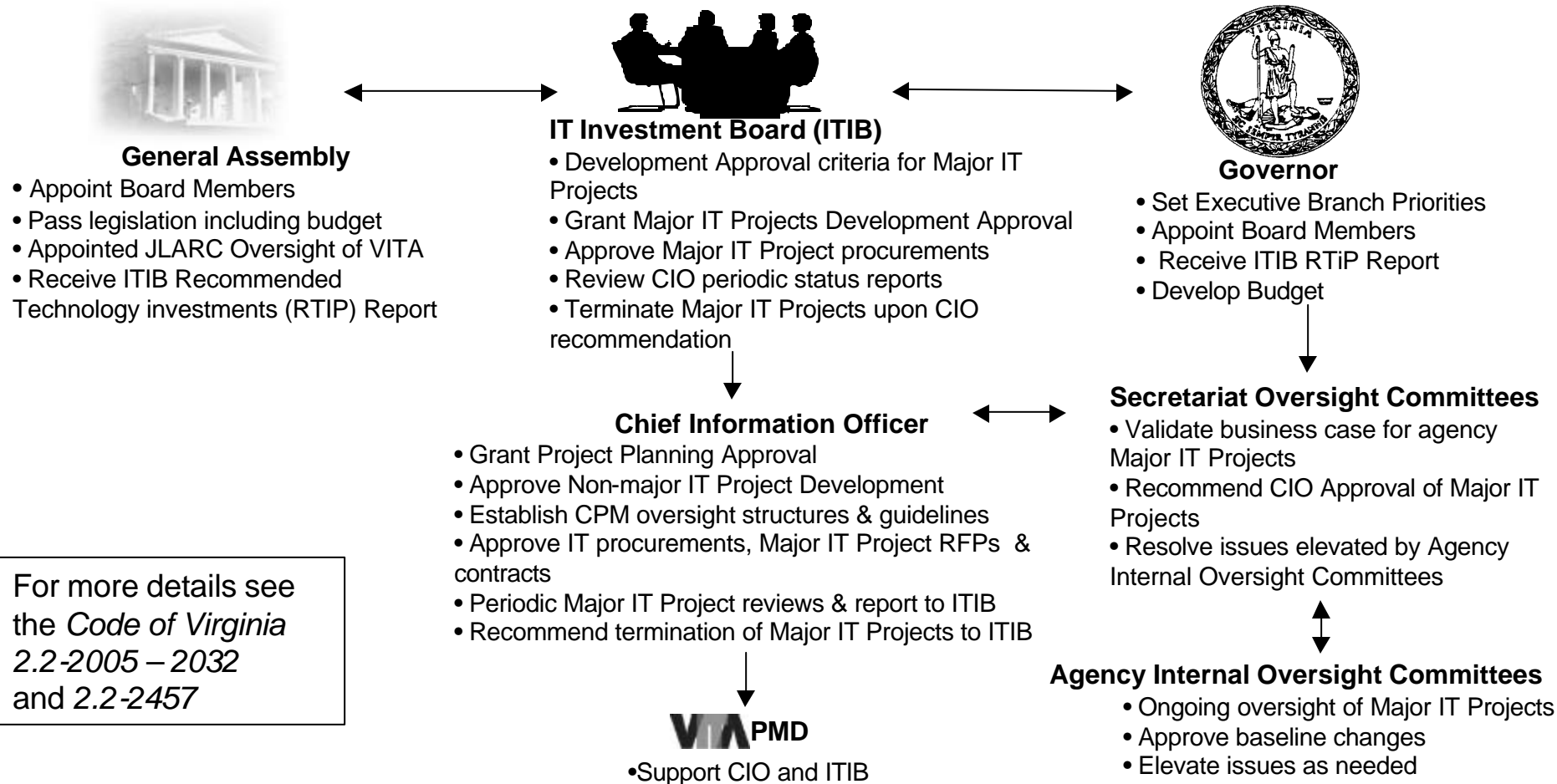
- **Value and outcomes driven**
- **Customer service focused**
- **Stakeholder involvement**
- **Transparency**
- **Best Practices**



CPM Accomplishments



CPM Governance Structure





CPM Project Oversight

Code of Virginia
Commonwealth Technology Management (CTM) Policy and
Supporting CTM Standards and Guidelines
Best Practices

Selection

Initiation

Detailed
Planning

Execution

Closeout

CIO
Planning
Approval and
ITIB RTIP
Report to
Governor and GA

PMD &
Secretariat
Development
Approval
Recommendation

CIO
Development
Approval
Recommendation
to ITIB

ITIB
Development
Approval

Major IT
Project
Dashboard
Baselines

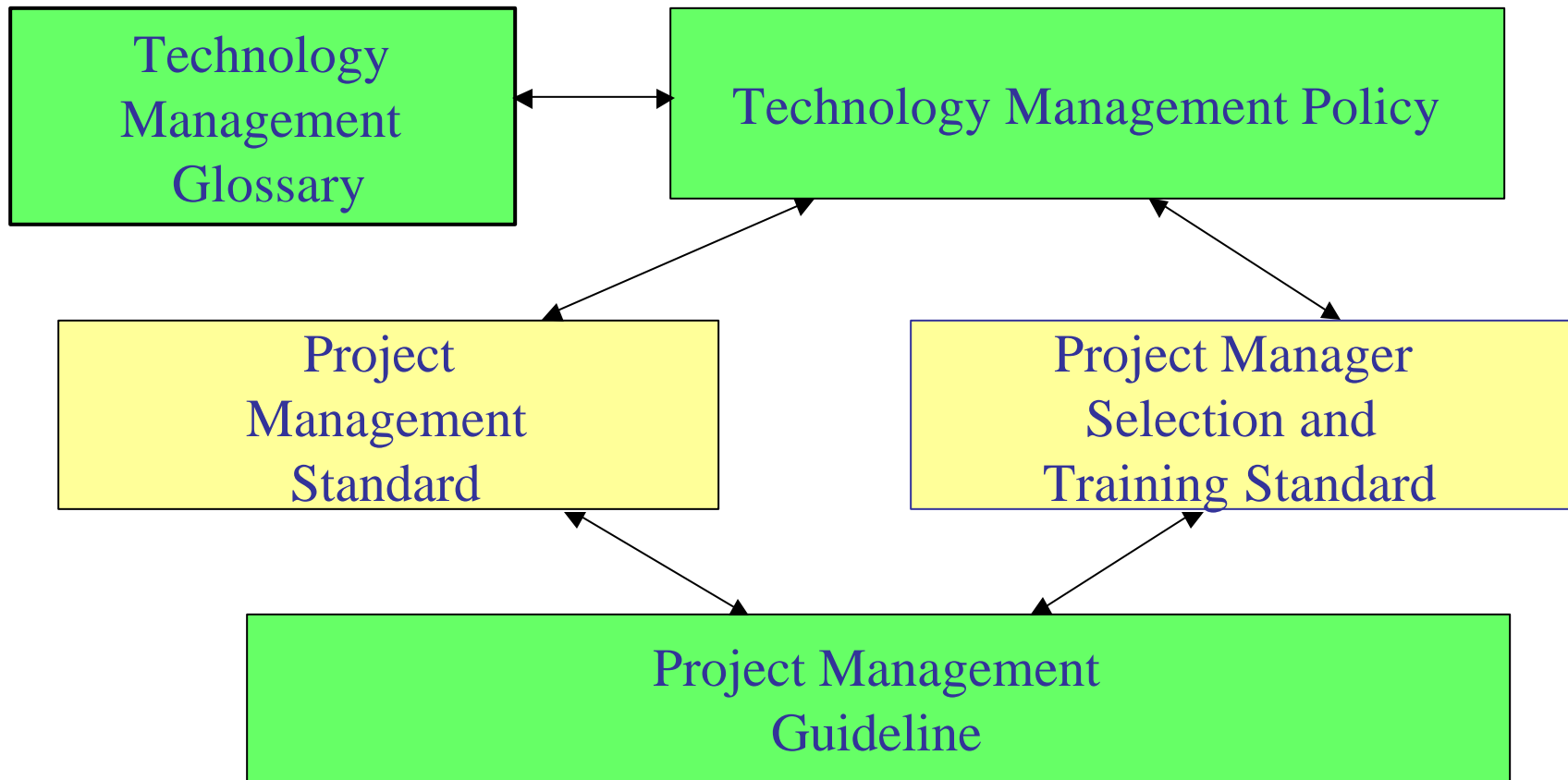
Dashboard
& Oversight
Committees

Dashboard
& Oversight
Committees

← IV&V and
Periodic Reporting to the ITIB →



Project Management Policies, Standards, and Guidelines





Project Management Guideline Templates

Template	Instructions	Word Template	Excel Template
Project Initiation			
Project Analysis Worksheet			
Project Charter *			
Project Initiation Transition Checklist			
Project Proposal Document *			
Project Proposal Preliminary Risk Assessment *			
Project Planning			
Activity Definition Sequencing Worksheet			
Budget Plan			
Change and Configuration Management Plan			
Communications Plan			
Organization Breakdown Structure Worksheet			
Performance Plan			
Procurement Plan			
Project Plan *			
Project Planning Transition Checklist			

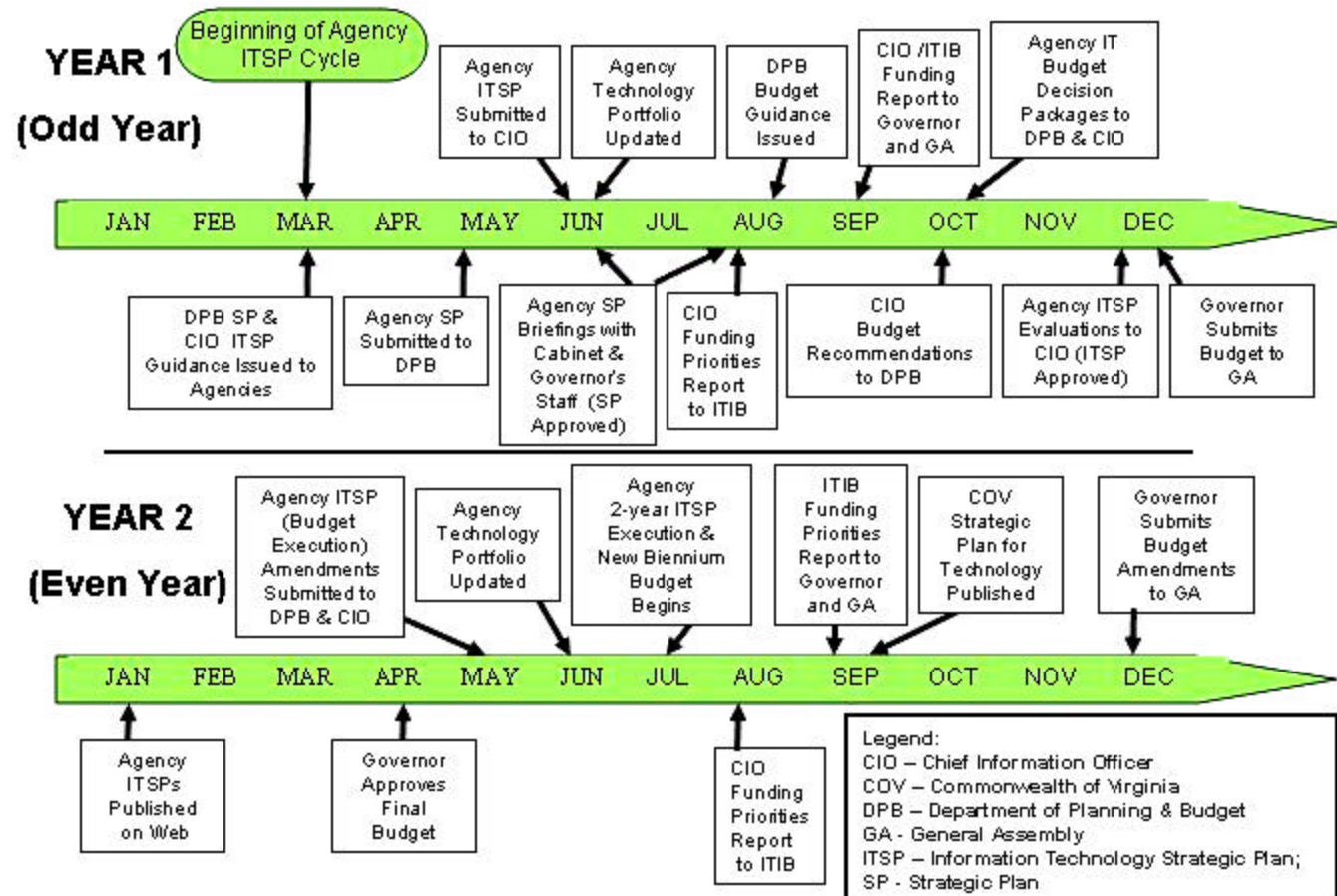


CPM Project Life Cycle Processes

PM Life Cycle	Code of Virginia (§2.2-2018 and 2019)	Asset Life Cycle	Policy
Selection		Asset Planning Retirement	IT Strategic Planning
	◆ Milestone: CIO Approval for Planning		
Initiation	Project Planning	Asset Procurement	Project Initiation
	◆ Milestone: ITIB/CIO Approval for Development		
Planning	Project Development	Asset Procurement	Project Planning
Execution and Control	Project Development	Asset Procurement	Project Execution and Control
Closeout	Project Development	Asset Procurement	Project Closeout
Operations and Support		Asset Operation and Management	Asset Operation and Management



Project Selection - Agency IT Strategic Planning





Code of Virginia § 2.2-2018.

Project Planning Approval Criteria

- ***degree to which the project is consistent with the Commonwealth's overall strategic plan;***
- ***technical feasibility of the project; (if known)***
- ***benefits to the Commonwealth of the project, including customer service improvements;***
- ***risks associated with the project;***
- ***continued funding requirements; and***
- ***past performance by the agency on other projects;***



Project Planning Approval Scoring and Ranking

Source of Data for Ranking Projects

Benefits to the Commonwealth (20)

From Project Proposal Evaluation	Score
Constituencies Benefited. (0 to 5 points) To what degree does the project anticipate improvements to internal and external customer service delivery?	
Positive Return on Investment. (0 to 5 points) To what degree will the project benefit the project cost (ROI)?	
Enterprise Business Strategies. (0 to 10 points) To what degree does the project support the Enterprise Business Strategies of the Commonwealth?	

Risk Associated With Project (7)

From Project Proposal (0 and points)	Score
(100 - Preliminary Risk Score) / 25	
From Project Proposal Evaluation	Score
Agency Risk Management Approach. (0 to 3 points)	

Past Performance of Agency (5 point spread)

From Project Dashboard	Score
Past Performance on Major Technology Projects. (-1 to +1) The default rating for this criterion is zero. However, if the agency has received an overall average of red for any three consecutive months from their Secretarial review, the score is -1. If the agency has received an overall average of green for any three consecutive months from their Secretarial review, the score is +1.	
From Project Proposal Evaluation	Score
Information Technology Investment Management Practices. (0 to 3 points) This reflects the degree to which the agency employs acceptable IT investment management practices.	

Technical Feasibility of the Project (5)

From Project Proposal Evaluation	Score
Viability of project based upon description. (0 to 5 points) To what degree will the proposed project utilize information technologies that will be viable for the expected life of the solution?	

Evolution Criteria	Points	Comments
Strategic Alignment - Total Points	30	
Commonwealth Technology Strategic Plan	10	10 points if the project supports a Commonwealth Technology Strategic Initiative Based upon 2 SP projects
Enterprise Business Strategies (EBS)	10	2 points for each Enterprise Business Strategy the project supports. Distribute points across the overall EBS
Agency Strategic Direction	10	5 points if the project supports a Commonwealth business priority and 5 points if it supports a Commonwealth issue
Benefits to the Commonwealth - Total Points	25	
Constituencies benefited	5	
Likelihood benefits can be realized	5	Subjective
Positive Return on Investment if given	5	
Monitored	10	
Score to the Commonwealth Agency - Total Points	15	
Overall average of all projects listed on the Dashboard for the agency	5	Yellow overall rating average for any three consecutive months is the best you is: green - (5) points yellow - (3) points red - (0) points
This project listed on Dashboard	5	Yellow overall rating for the last three months required is: green - (5) points yellow - (3) points red - (0) points
ITIM processes required	5	Up to (5) points
Funding Requirements	15	
Reasonableness of cost estimates	5	Subjective
Source of funding is identified	3	
Totally non-state funded	5	
Partially non-state funded	2	
Risk	15	
Cost of the project	?	Under \$5m - (7) points From \$5-10m - (5) points From \$10-20m - (3) points Over \$20m - 0 points
Viability of project based upon description	5	Subjective Evaluation
Agency risk management approach	3	Subjective Evaluation



Major IT Project Initiation

- Project Charter
- Project Proposal (Business Case)
- Planned Procurements Supporting the Project
- Preliminary Risk Assessment
- Major Milestones



Project Development Approval Balanced Scorecard

**Commonwealth of Virginia
Balanced Scorecard Project Evaluation
for the
VSU – Re-engineer Core Business Processes Project**

Criteria	Score	Comment
<u>Stakeholder Perspective</u>	G	
1. To what degree does the proposed investment result in significant tangible and intangible benefits for stakeholders?	G	The project cost is justified by tangible benefits from cost avoidance and cost reductions. Replacement of existing administrative systems will result in a cost avoidance of staff services needed to support increased student enrollments. In addition, VSU will realize cost reductions in hardware and software maintenance costs and operational support. Other tangible benefits cited but not quantified include increased alumni and stakeholder investments and CoVA institutional collaboration opportunities for software enhancements and interfaces. Intangible benefits of improved customer service and ability to exchange and report information with CoVA agencies are cited.
2. To what degree does the proposed investment target stakeholders that have been chronically underserved by information technology investments?	G	VSU administration and students are cited as underserved stakeholders. In addition, the proposal references a foreign-born transitional student population, teacher certification candidates, and continuing education students in need of on-line courses and student registration services.
3. To what degree does the proposed investment increase public protection, health, education, environment, or safety?	G	The proposed system will provide necessary administrative functionality for the operation of the university as well as increased access to education through on-line courses and student services.



Project Planning – Detailed Project Plans

- Approved by Agency Internal Oversight Committee
- Establishes project baselines for Dashboard Reporting
 - Scope
 - Costs
 - Schedule
 - Performance
 - Risk



Project Execution, & Control Dashboard Status Reporting

- Web-based status reporting system
- Provides concise and timely summary status of major IT projects.
- Establishes a consistent, common framework for agency, Secretariats, and CIO to update project activity, monitor progress, and assess risks
- Enhances ability to respond to project changes in a timely manner
- Increases accountability
- Improves project management capabilities
- Provides public view on VITA Web site



Commonwealth Major IT Project Status Report Dashboard



Commonwealth Major IT Project Status Report Dashboard



Public View

Project List

Timespan: December 2003 - February 2004

Education

Agency	Project Formal Title	Back	December 2003*	January 2004*	February 2004*	Forward
Christopher Newport University	Web Accessible Integrated System	Back	↑	↑	↑	Forward
Department of Education	Education Information Management System	Back	NR	NR	NR	Forward
Department of Education	Web Based SQL Technology Initiative	Back	↑	↑	↑	Forward
George Mason University	Patriot Project - Banner Student Implementation	Back	↑	↑	↑	Forward
Radford University	Upgrade Administrative Computer Systems	Back	↑	↑	↑	Forward
Richard Bland College	Enterprise Resource Management System	Back	↑	↑	↑	Forward
The College of William & Mary	Mastering Administrative Systems & Technologies	Back	↑	↑	↑	Forward
University of Virginia	Grade 11i Upgrade	Back	↑	↑	↑	Forward

Finance

Agency	Project Formal Title	Back	December 2003*	January 2004*	February 2004*	Forward
Department of Taxation	Partnership Project	Back	↑	↑	↑	Forward



Project Execution, & Control Independent Verification and Validation (IV&V)

- Verification and validation of project fulfillment required during planning and execution for all Major IT Projects
- IV&V strategy must be approved as part of Project Development approval
- PMD will implement a comprehensive IV&V program as a VITA service offering using VITA qualified IV&V vendors (*Planned Implementation Sept 04 – Jan 05*)
- IV&V reports will supplement and validate dashboard reporting

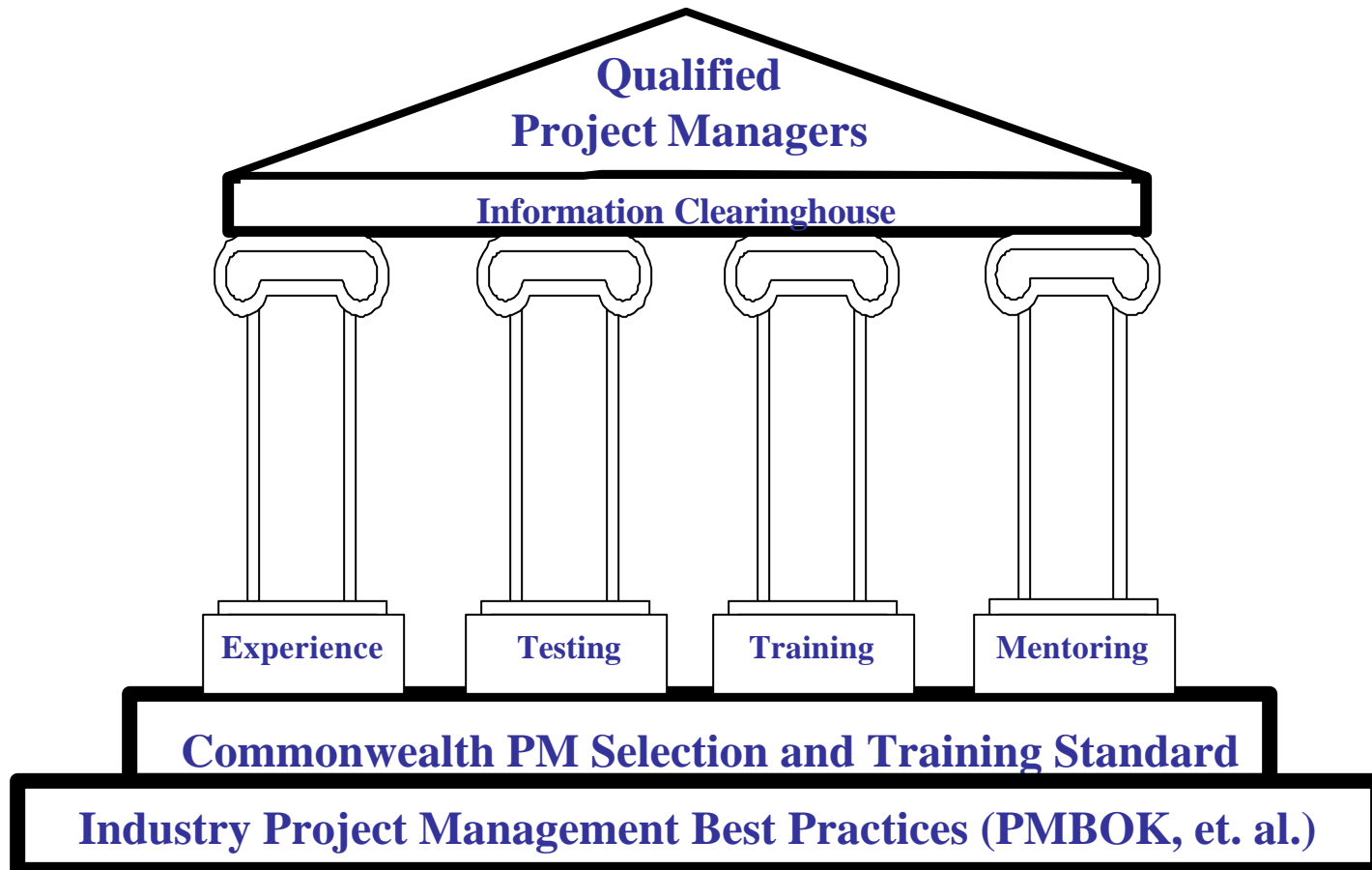


CPM Closeout

- Project Closeout Report Required
 - Measures Outcomes
 - Identifies Lessons Learned
 - Identifies Best Practices



CPM Project Manager Development Program



Project Manager Training and Selection Process

Step 1

Register (online) in the program with Virginia Information Technologies Agency



Attend Part I Training - Commonwealth Overview

Step 2

Identify what training and testing is needed

Step 3

Testing

Fail

Successfully complete training

Pass

Step 4

Completes minimum experience



Complete and/or update qualification record, and authenticate training, experience, and education

Step 5

Supervisor verifies experience and training

Step 6

Project manager qualifies for specific project

Step 7



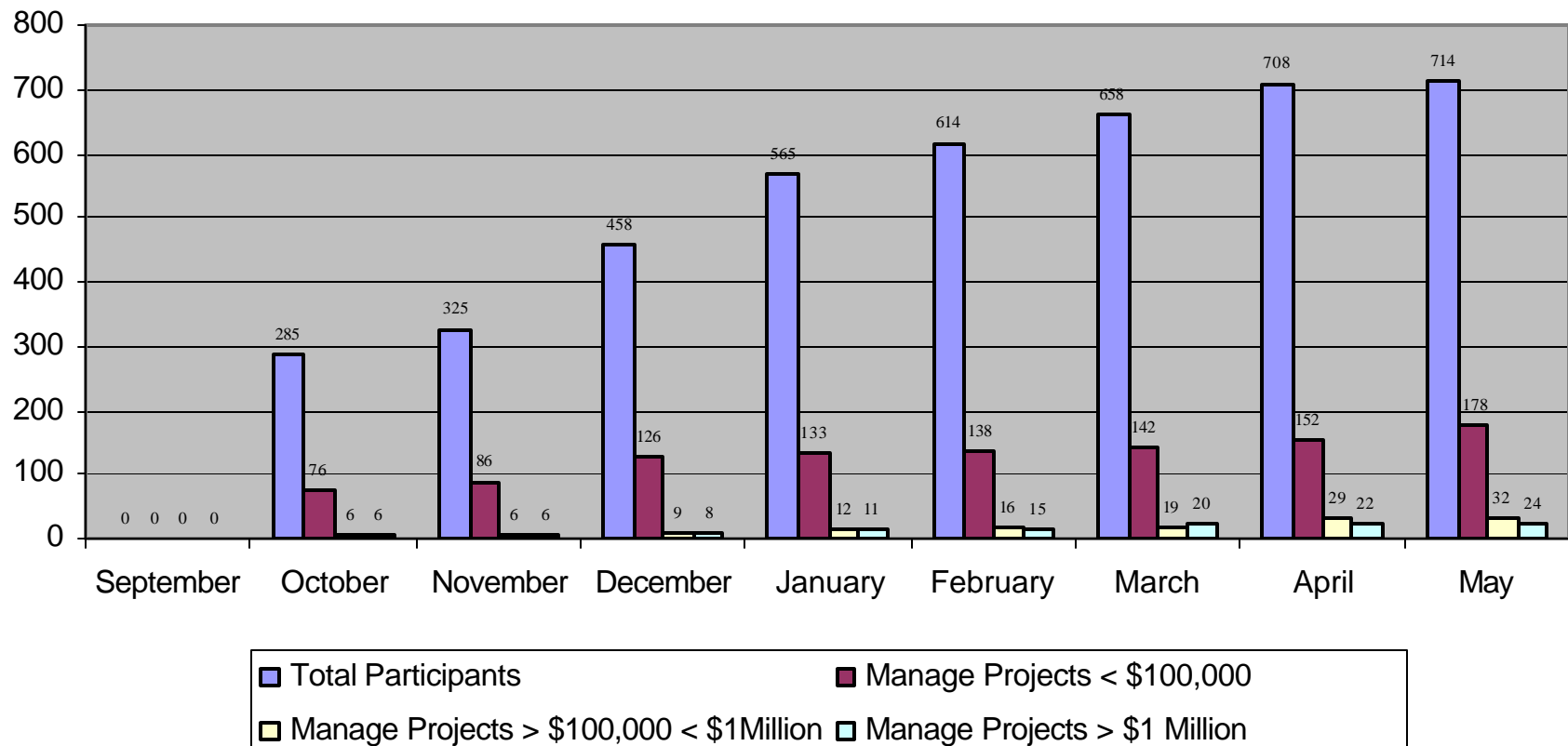


PMDP Benefits

- Satisfies *Code of Virginia* mandates
- Establishes a common minimum baseline of knowledge standards
- Emphasizes balance of Training, Experience, and Knowledge
- First Step in establishment of a Commonwealth IT Project Management Community
- Cost effective program
- Improved project management capability



PMDP Participation





CPM Reporting

- VITA Quarterly Report
- Multiple views of the Commonwealth Technology Investment Project Portfolio Report - *facilitate management of the Portfolio*
- Commonwealth Technology Investment Project Approval Tracking Report — *provides customers with “Fed Ex” tracking view (To be developed)*
- Project Manager Qualifications Report — *facilitates review of PM qualifications*



Recommended Technology Investment Projects for the 2004-2006 Budget Biennium Report

- Report prepared by the ITIB for the Governor and General Assembly
- Recommend technology investments and priorities for funding such investments by September 1 of each year
- Recommended projects for each Secretariat requiring funding in FY05-06
- Top priority projects in rank order for FY05-06



CPM Current Status



CPM Portfolio Status

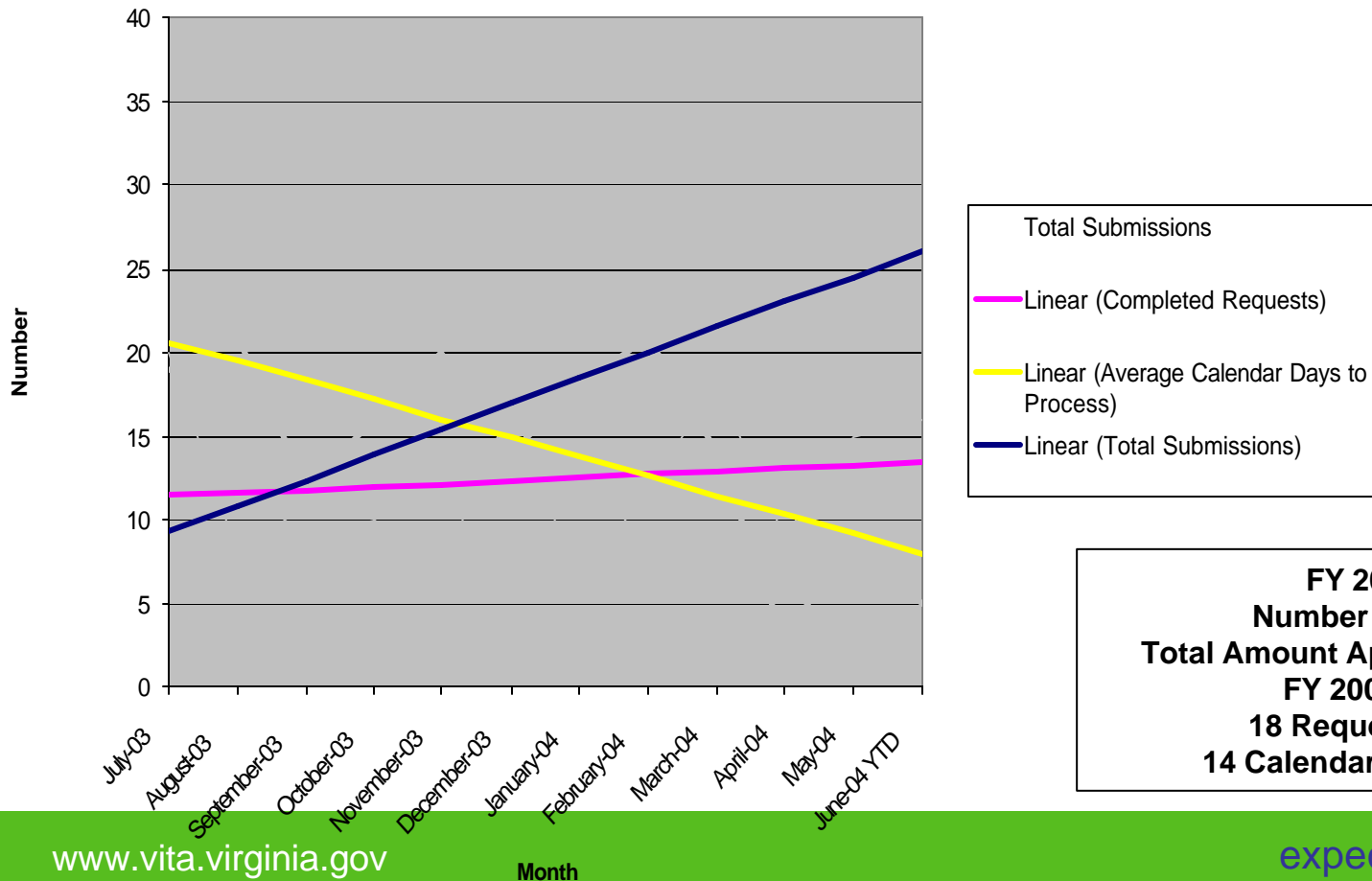
Exhibit 5-2
Commonwealth Major IT Project Portfolio Summary
as of June 15, 2004

	No. of Projects	Project Cost (Estimate At Completion)
Identified for Preliminary Planning	35	\$245,640,461
Recommended for Planning	2	\$6,900,000
Approved for Planning (by CIO)	84	\$242,916,870
Recommended for Development Approval (by Secretarial Oversight Committee & CIO)	0	\$0
Approved for Development (by IT Investment Board)	2	\$16,614,500
Active Projects	35	\$940,736,671
Suspended Projects	3	\$21,213,000
Completed Projects (previously Projects Pending Closeout)	6	\$77,060,973
Cancelled Projects	0	\$0
ITIB Terminated Projects	0	\$0
Commonwealth Totals	165	\$1,544,182,425



Procurement Status

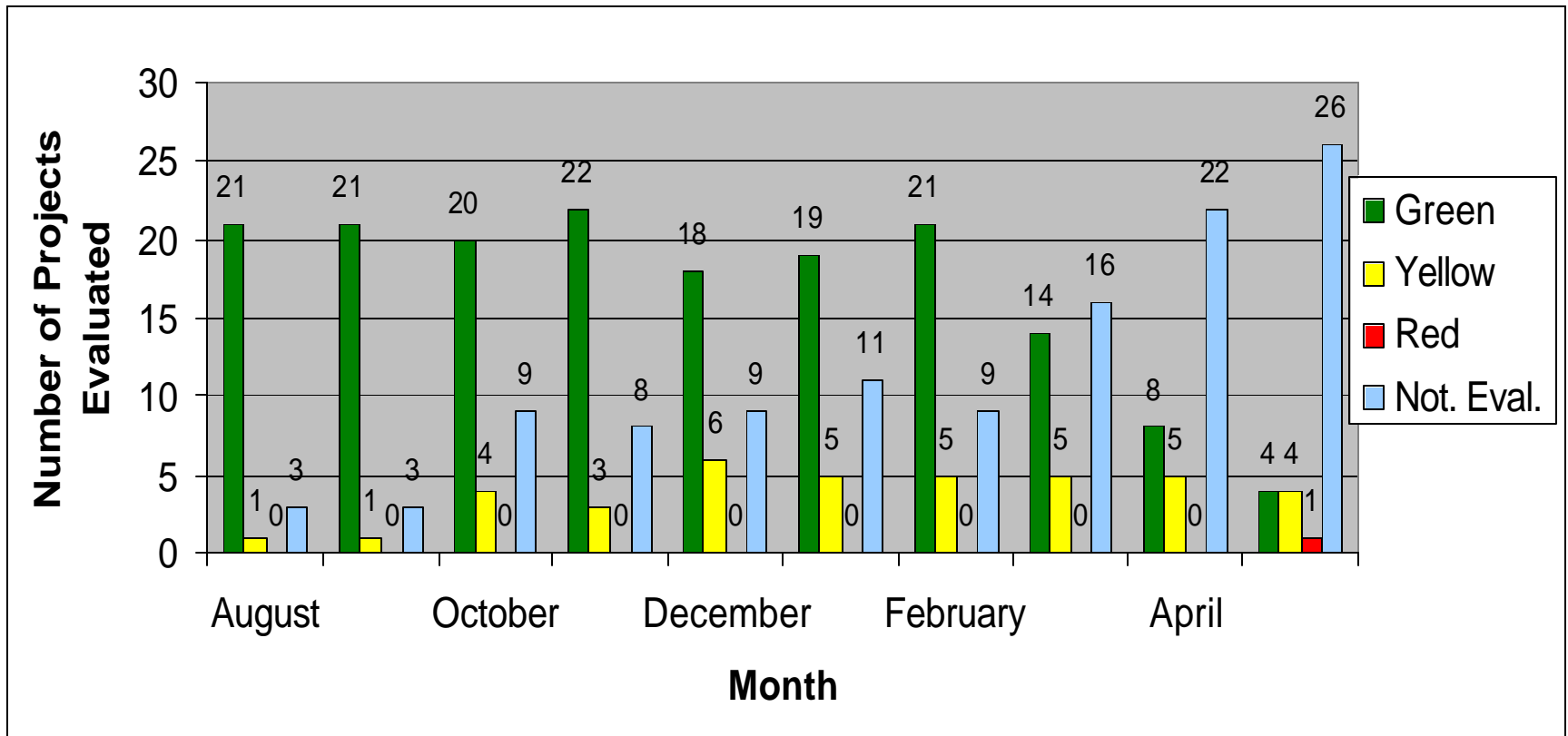
Agency Procurement Requests



FY 2004 Totals
Number Approved 149
Total Amount Approved \$108,009,257
FY 2004 Averages
18 Requests per Month
14 Calendar Days to Process



CPM Dashboard Status



Status of Active projects evaluated through February 2004, as of 6/15/04



CPM Upcoming Milestones

Milestone	Timetable
Publish Commonwealth Project Management Standard	Sep-04
Complete Review and Revision of PM Guidelines (CBA Addition)	Sep-04
Develop and Implement Web-based Project Proposal and Charter Submission process	Jan-05 to April-05
Continue Development and Implementation of Information Clearing House:	
Deliver best practices and lessons learned capability	Completed
Deliver project manager bulletin board	Completed
Deliver PM news and recognition page	Completed
Deliver major projects information search capability	TBD - Resource Constraints
Deliver vendor information search capability	TBD - Resource Constraints
Deliver new developments page	TBD - Resource Constraints
Deliver project mentor page	TBD - Resource Constraints
Project Manger Development Program:	
Revise Commonwealth PM Overview Training	Jul-04
Provide Commonwealth PM Overview Training	Aug-04
Provide Commonwealth PM Overview Training	Nov-04
Implement Project Mentorship Component of PMDP	TBD - Resource Constraints
Complete Phased Implementation of PM Selection and Training Standard	May-05



CPM Web Links

- ITIB Documents
<http://www.vita.virginia.gov/ITIB/docs.cfm>
- Commonwealth Technology Management Policy
<http://www.vita.virginia.gov/projects/cpm/cpmDocs/tech2002.cfm>
- Agency IT Strategic Plans
<http://www.vita.virginia.gov/ctp/strategic.cfm>
- Project Management Web site
<http://www.vita.virginia.gov/projects/cpm/cpm.cfm>
- Project Management Templates
<http://www.vita.virginia.gov/projects/cpm/templates.cfm>
- Major IT Project Status Report Dashboard
<http://www.vita.virginia.gov/projects/pubDashboard.cfm>
- Project Manager Development Program
<http://www.vita.virginia.gov/ittrain/pmdev/pmdev.cfm>



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